



GUAM VISITORS BUREAU
Japan Visitor Tracker Exit Profile
FY2012 MARKET SEGMENTATION –
OCTOBER 2011



Prepared by: QMark Research

Information contained herein is the property of the Guam Visitors Bureau.

The use of this information, in part or in whole, shall require written permission from the Guam Visitors Bureau.

Background & Methodology

- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **326** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **326** is +/- 5.4 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.4 percentage points.

Objectives

- **The specific objectives of the analysis were:**
 - To determine the relative size and expenditure behavior of the following market segments:
 - Families
 - OL's/ salary women
 - Group travelers
 - Silvers
 - Wedding participants
 - Sports activities/spectators
 - 18-35
 - 36-55
 - Traveling with children
 - Honeymooners
 - Repeat visitors
 - To identify (for all Japanese visitors) the most important determinants of on-island spending; and
 - To identify the most significant factors affecting overall visitor satisfaction.

Highlighted Segments Parameters

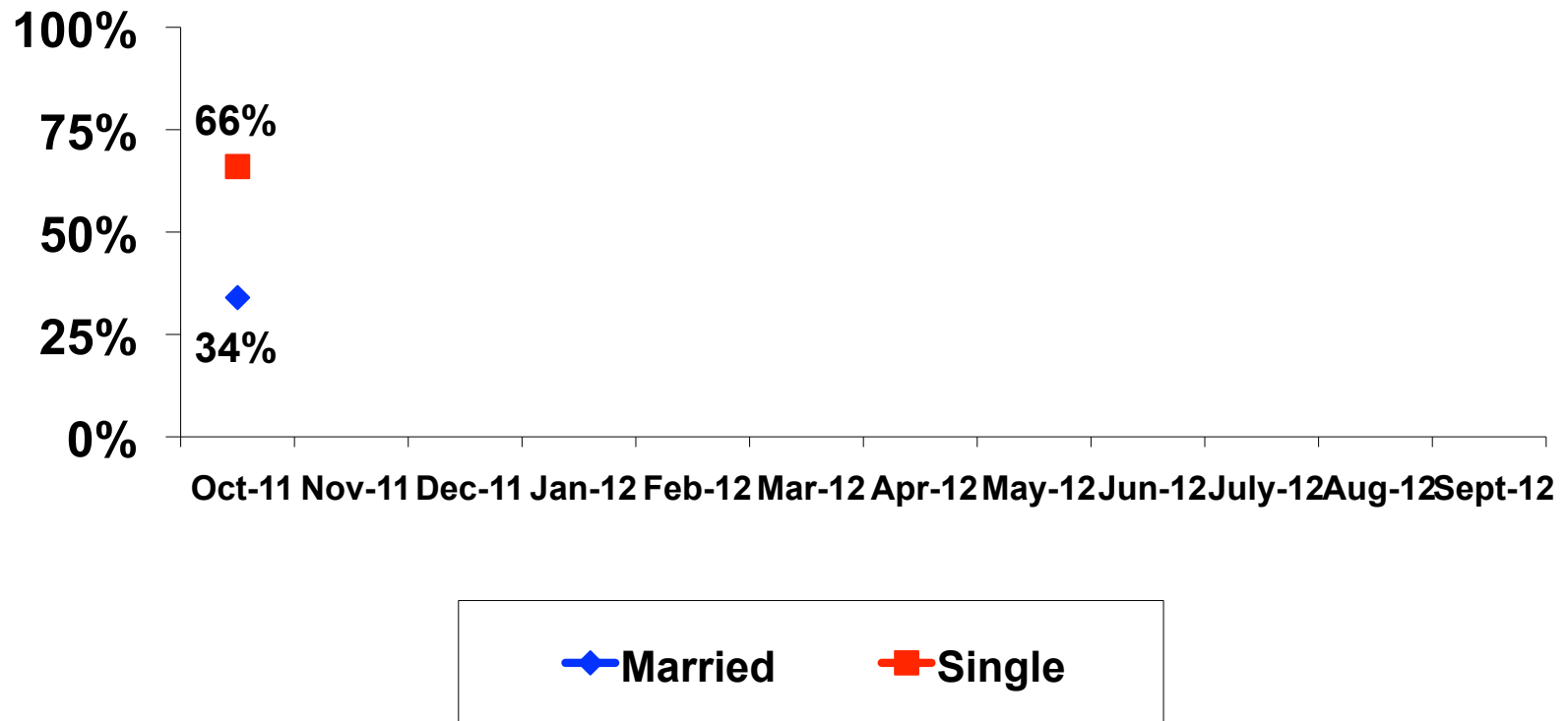
- Families – Q.6
- OL's/ salary women – Q.29/Female
- Group travelers – Q.7
- Silvers – Q.D
- Wedding participants – Q.5
- Sports activities/spectators –
Q.5/Q.18/Q.19/Q.28
- 18-35 – Q.D
- 36-55 – Q.D
- Traveling with children – Q.6
- Honeymooners – Q.5
- Repeat visitors – Q.3A

Highlighted Segments

	Oct 11	Nov 11	Dec 11	Jan 12	Feb 12	Mar 12	Apr 12	May 12	Jun 12	July 12	Aug 12	Sept 12
Families	15%											
Office Lady	14%											
Group	3%											
Silver	2%											
Wedding	4%											
Sport	67%											
18-35	77%											
36-55	19%											
Child	6%											
Honeymoon	6%											
Repeat	33%											
TOTAL	326											

SECTION 1 **PROFILE OF RESPONDENTS**

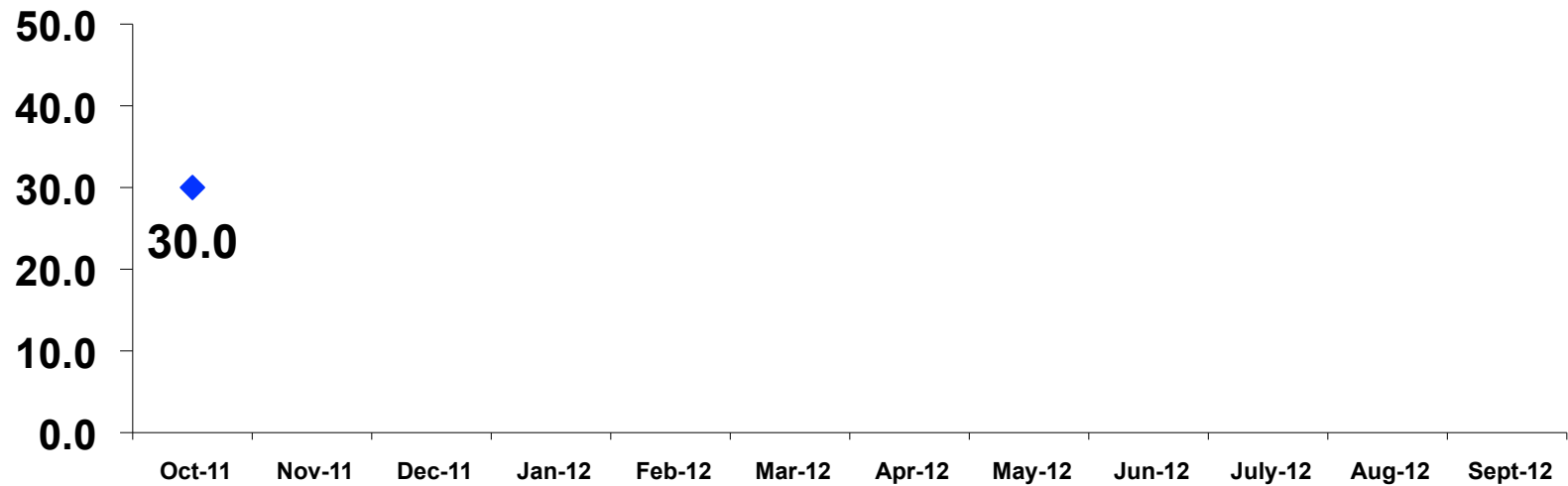
Marital Status Tracking



Marital Status Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
C.	Married	Count	111	34	7	1	5	9	66	50	50	17	20	39
		Col %	34%	69%	16%	13%	100%	69%	30%	20%	79%	85%	95%	36%
	Single	Count	215	15	38	7		4	151	202	13	3	1	70
		Col %	66%	31%	84%	88%		31%	70%	80%	21%	15%	5%	64%
Total	Count		326	49	45	8	5	13	217	252	63	20	21	109

Average Age Tracking



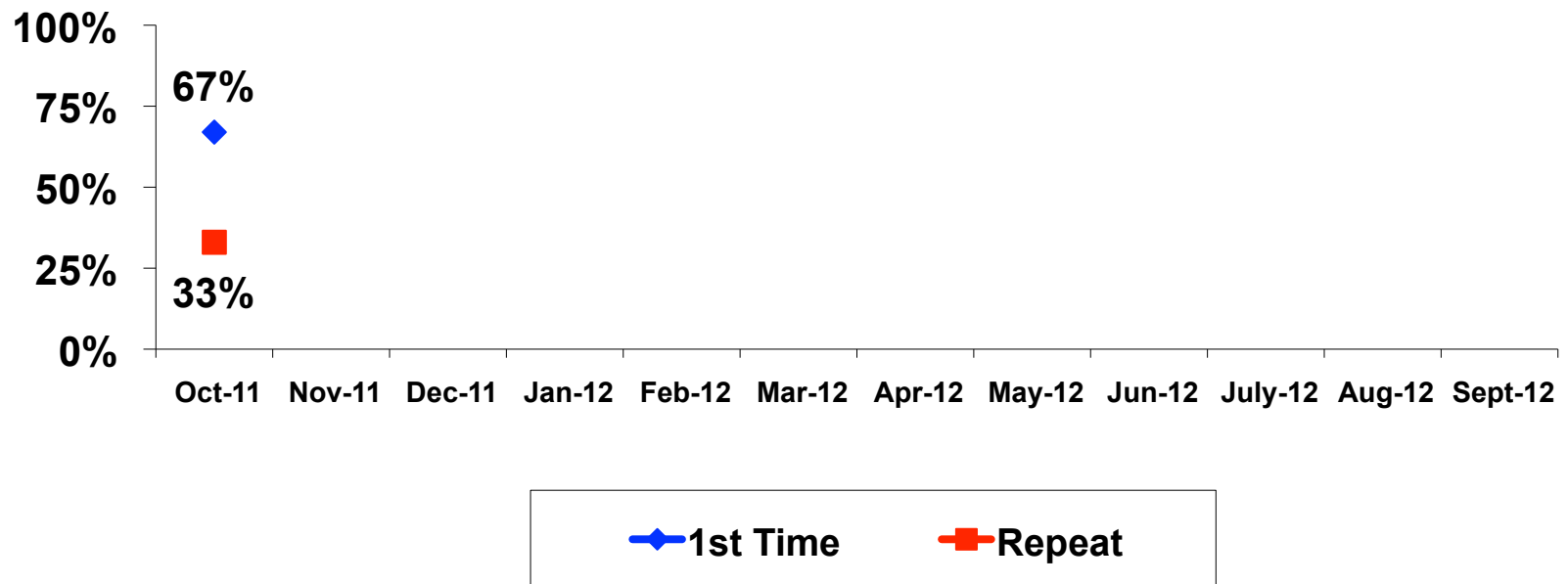
Age Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
D.	18-34	Count	246	23	41	6		11	175	246		7	18	78
		Col %	75%	47%	91%	75%		85%	81%	98%		35%	86%	72%
	35-54	Count	68	22	4	2		2	38	6	62	13	3	28
		Col %	21%	45%	9%	25%		15%	18%	2%	98%	65%	14%	26%
	55+	Count	12	4			5		4		1			3
		Col %	4%	8%			100%		2%		2%			3%
Total	Count		326	49	45	8	5	13	217	252	63	20	21	109
D.	Mean		30.0	37.3	26.5	28.0	64.6	30.9	28.4	25.6	42.5	37.8	27.7	31.5
	Median		27	36	25	24	63	29	26	25	42	38	27	28

Income Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
Q.31	Less than Y2 million	Count	23	3	5			1	16	21	2		2	12	
		Col %	8%	7%	12%			8%	8%	9%	4%		10%	12%	
	Y2,000,001 - Y3,000,000	Count	41	4	9	3			2	31	38	3	2	3	10
		Col %	14%	9%	21%	43%			15%	16%	17%	5%	11%	15%	10%
	Y3,000,001 - Y4,000,000	Count	33	6	4				2	22	31	2	1	4	7
		Col %	11%	13%	10%				15%	11%	14%	4%	5%	20%	7%
	Y4,000,001 - Y5,000,000	Count	46	5	4	1			4	32	36	9	2	5	14
		Col %	16%	11%	10%	14%			31%	17%	16%	16%	11%	25%	14%
	Y5,000,00 - Y7,000,000	Count	68	14	7	1	4		3	44	46	16	6	2	23
		Col %	24%	30%	17%	14%	100%		23%	23%	21%	29%	32%	10%	23%
	Y7,000,001 - Y10,000,000	Count	35	7	5					24	23	12	5	1	14
		Col %	12%	15%	12%					12%	10%	22%	26%	5%	14%
	Y10,000,001 or more	Count	35	7	7	2			1	21	22	11	3	3	17
		Col %	12%	15%	17%	29%			8%	11%	10%	20%	16%	15%	17%
No Income	Count	7		1					3	6				4	
	Col %	2%		2%					2%	3%				4%	
Total	Count	288	46	42	7	4		13	193	223	55	19	20	101	

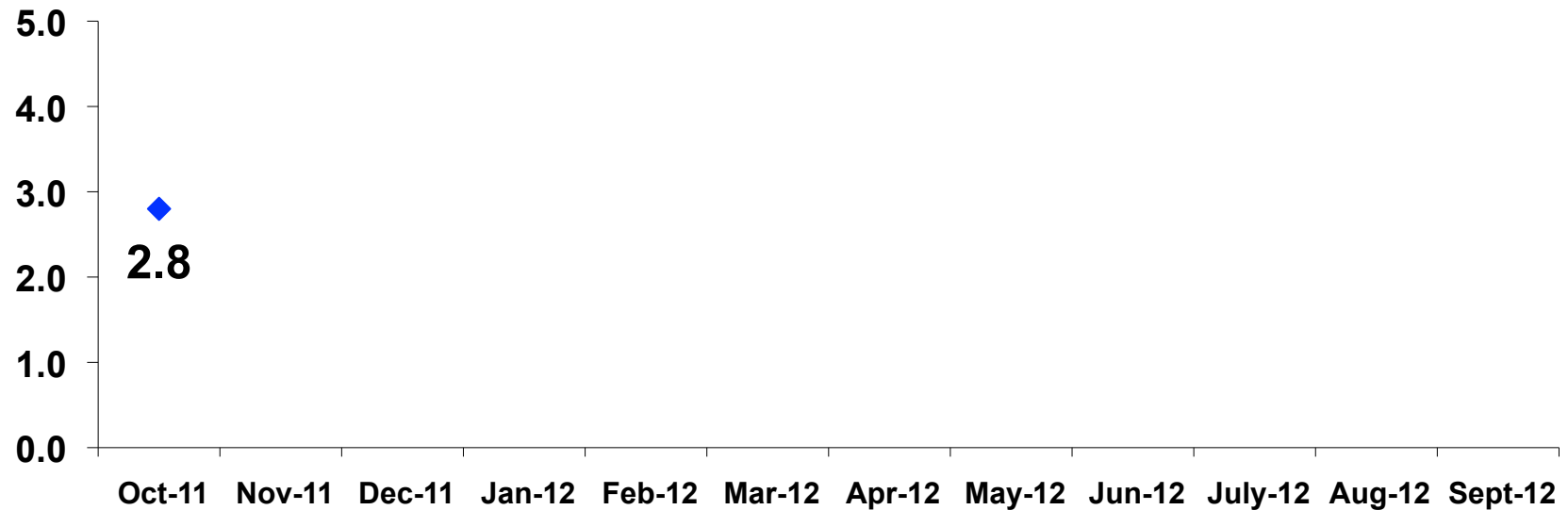
Prior Trips to Guam Tracking



Prior Trips to Guam Segmentation

			TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.3A	Yes	Count	217	26	27	5	4	9	150	172	37	8	20	
		Col %	67%	53%	60%	63%	80%	69%	69%	68%	59%	40%	95%	
	No	Count	109	23	18	3	1	4	67	80	26	12	1	109
		Col %	33%	47%	40%	38%	20%	31%	31%	32%	41%	60%	5%	100%
Total		Count	326	49	45	8	5	13	217	252	63	20	21	109

Average Length of Stay Tracking



Average Length of Stay Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.8 Mean	2.8	2.9	2.6	2.5	3.0	3.2	2.8	2.8	2.9	3.1	3.4	2.7
Median	3	3	3	3	3	3	3	3	3	3	3	3
Minimum	1	1	1	1	2	2	1	1	1	2	2	1
Maximum	8	8	4	3	4	4	7	7	8	8	5	4

SECTION 2 **TRAVEL PLANNING**

Travel Planning Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.7 Full package tours	Count	51	9	14		1	3	37	40	9	5	6	18
	Col %	16%	18%	31%		20%	23%	17%	16%	14%	25%	29%	17%
Free-time package tours	Count	248	33	31		4	8	164	199	41	12	14	83
	Col %	76%	67%	69%		80%	62%	76%	79%	65%	60%	67%	76%
Individually arranged travel	Count	12	7				2	6	4	8	3	1	5
	Col %	4%	14%				15%	3%	2%	13%	15%	5%	5%
Group tour	Count	8			8			7	6	2			3
	Col %	2%			100%			3%	2%	3%			3%
Other	Count	1						1	1				
	Col %	0%						0%	0%				
Company paid travel	Count	5						1	1	3			
	Col %	2%						0%	0%	5%			
Total	Count	325	49	45	8	5	13	216	251	63	20	21	109

Travel Motivation Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Q.5 Beautiful seas, beaches, tropical climate	57%	43%	71%	13%	40%	8%	62%	58%	51%	50%	62%	57%
Pleasure	50%	37%	60%	13%	40%	31%	49%	53%	38%	45%	24%	52%
Shopping	48%	41%	64%			38%	50%	54%	30%	30%	29%	55%
Price of the tour package	38%	39%	40%	13%	20%	23%	39%	39%	35%	40%	29%	39%
Short travel time	38%	35%	40%		40%	23%	38%	38%	40%	50%	33%	40%
Just to relax	34%	27%	47%		20%	23%	30%	33%	37%	30%	5%	39%
A previous visit	23%	31%	24%	25%	20%	15%	20%	23%	25%	40%		70%
Water sports	25%	8%	31%	13%		8%	37%	27%	17%	10%	10%	21%
Recommendation of friend, relative, travel agency	21%	16%	27%	13%	40%		22%	21%	17%	10%	5%	13%
It is a safe place to spend a vacation	11%	14%	13%				10%	10%	16%	15%	10%	16%
Honeymoon	6%	6%	4%			23%	8%	8%	3%	5%	100%	1%
SCUBA diving	6%	2%	4%			8%	9%	6%	5%		5%	7%
To get married or Attend wedding	4%	18%	2%			100%	4%	5%	2%	10%	14%	4%
Company or Business trip	5%	6%	4%	50%		8%	4%	3%	10%	15%		4%
Other	2%	2%	2%	13%			3%	2%	3%			3%
To visit friends or relatives	1%	4%	2%			8%	1%	1%		5%		
To golf	1%						2%	1%	2%			1%
My company sponsored me	1%	2%					0%		3%	5%		
Promotional materials from GVB	1%	2%						0%		5%		2%
Special promotion	1%				20%				2%			1%
Total Cases	325	49	45	8	5	13	217	252	63	20	21	109

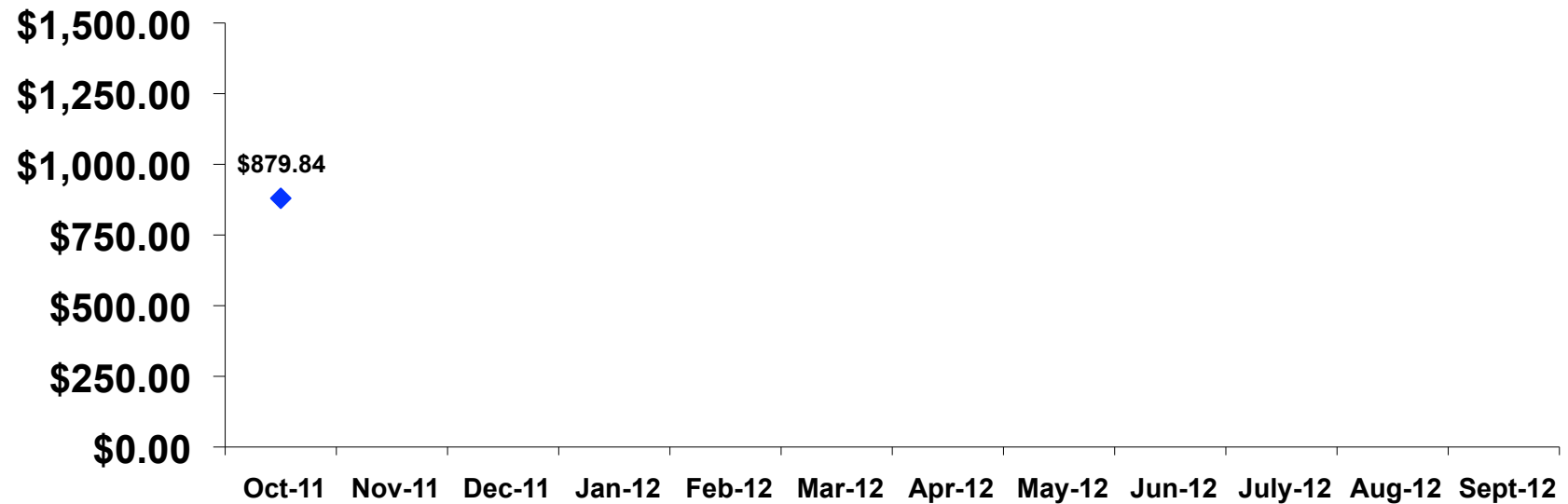
Information Sources Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT	
Q.1													
Travel guide book at bookstores	65%	62%	70%	63%	50%	58%	67%	66%	60%	58%	67%	56%	
Internet	55%	68%	55%	38%	50%	50%	51%	51%	70%	74%	38%	59%	
Travel agent brochure	46%	30%	48%	50%	25%	50%	49%	49%	33%	32%	48%	38%	
I have been to Guam before	34%	49%	41%	38%	25%	33%	31%	32%	40%	63%	5%	99%	
Magazine	22%	13%	16%		25%	25%	22%	24%	14%	11%	29%	14%	
Friend or relative	20%	13%	25%	13%		33%	21%	22%	14%		5%	9%	
TV	7%	4%			50%		7%	6%	11%	5%	14%	3%	
Company travel department	5%		7%				6%	6%	2%			4%	
Newspaper	2%		2%		50%		1%	1%	3%			1%	
Other	1%						0%	0%	2%			1%	
GVB promotional activities	0%						0%	0%					
Total	Cases	318	47	44	8	4	12	213	245	63	19	21	108

SECTION 3 **EXPENDITURES**

Prepaid Expenditures Tracking

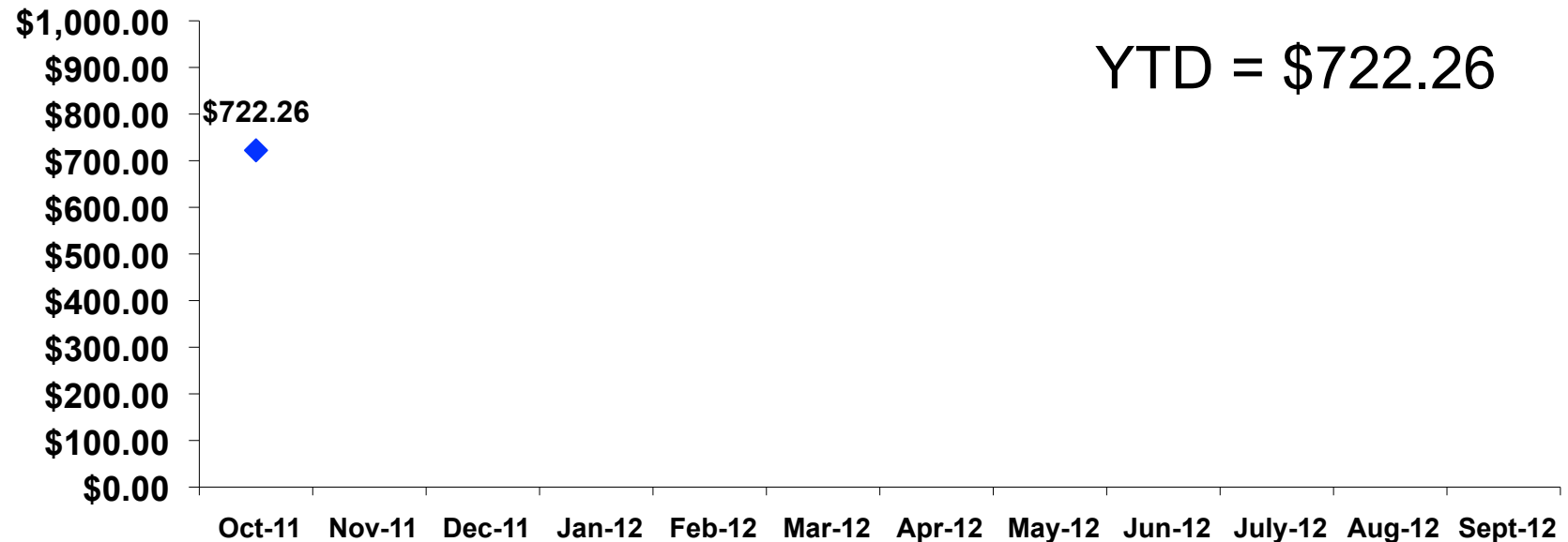
YTD=\$879.84



Prepaid Expenditures Per Person Segmentation

	TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Prepaid Mean	\$879.84	\$864.55	\$966.59	\$472.01	\$820.31	\$1,337.85	\$936.43	\$888.40	\$829.09	\$827.96	\$1,208.95	\$881.81
per Median	\$846	\$814	\$911	\$586	\$911	\$1,302	\$879	\$804	\$846	\$825	\$1,107	\$807
person Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$195.31	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
converted Maximum	\$3,242.19	\$2,604.17	\$2,278.65	\$1,041.67	\$1,171.88	\$2,604.17	\$3,242.19	\$3,242.19	\$2,278.65	\$1,649.31	\$2,604.17	\$3,242.19

On-Island Expenditures Tracking



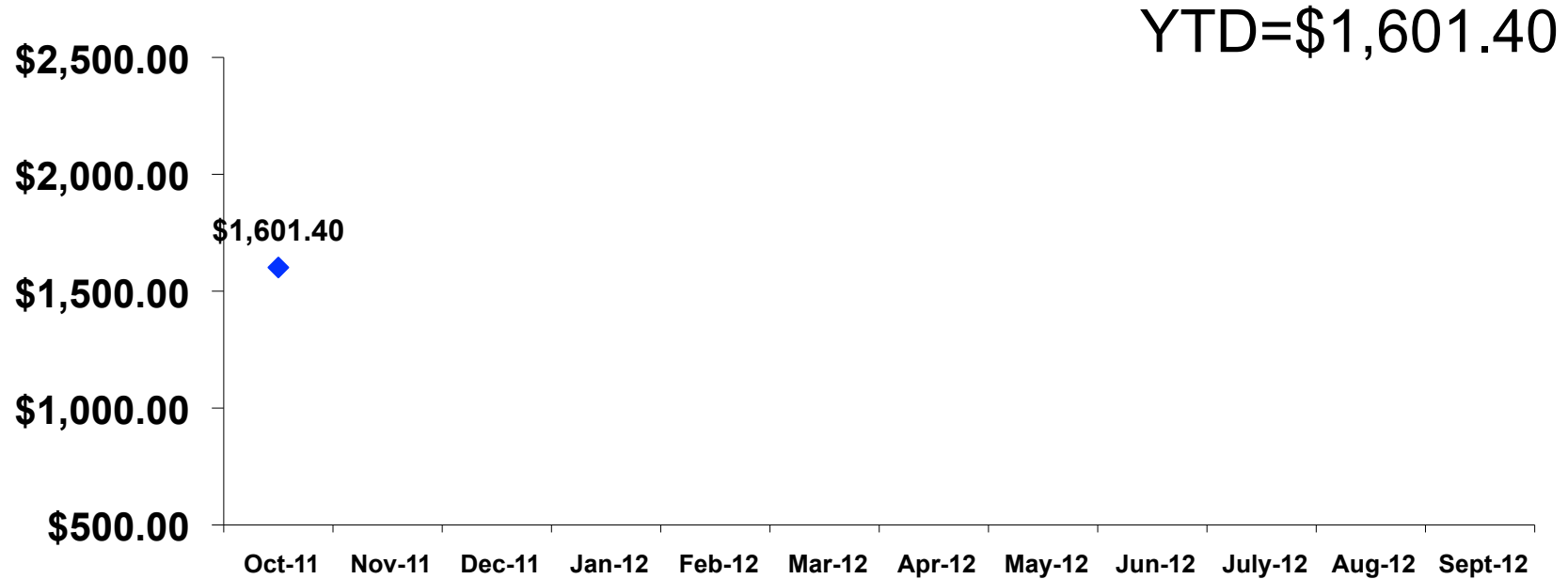
On-Island Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Per person on-island exp	Mean	\$722.26	\$701.72	\$797.40	\$492.38	\$343.33	\$609.46	\$780.11	\$747.79	\$670.55	\$471.46	\$895.03	\$809.18
	Median	\$550	\$500	\$700	\$400	\$265	\$385	\$613	\$600	\$400	\$310	\$775	\$600
	Minimum	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$0.00
	Maximum	\$5,625.00	\$5,000.00	\$3,500.00	\$1,239.00	\$685.00	\$2,250.00	\$5,000.00	\$5,000.00	\$5,625.00	\$1,500.00	\$2,250.00	\$5,000.00

On-Island Expense Breakdown

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
F&B-HOTEL	Mean	\$16.90	\$31.61	\$15.49	\$25	\$62.00	\$44.92	\$15.32	\$12.61	\$30.67	\$25.75	\$22.38	\$17.19
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$60.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F&B-FF REST/CONV	Mean	\$34.90	\$38.88	\$40.04	\$14.25	\$51.00	\$67.31	\$37.17	\$29.39	\$57.22	\$39.75	\$34.29	\$33.68
	Median	\$14.00	\$10.00	\$10.00	\$7.00	\$30.00	\$25.00	\$15.00	\$10.00	\$20.00	\$0.00	\$20.00	\$15.00
F&B-OUT- SIDE HOTEL/ REST	Mean	\$77.13	\$145.86	\$68.64	\$11.25	\$245.00	\$153.85	\$74.58	\$63.99	\$120.19	\$115.10	\$84.29	\$83.27
	Median	\$30.00	\$50.00	\$44.00	\$0.00	\$150.00	\$50.00	\$30.00	\$20.00	\$50.00	\$0.00	\$0.00	\$50.00
OPTIONAL TOUR	Mean	\$81.23	\$94.53	\$46.89	\$75.63	\$134.00	\$40.77	\$99.82	\$72.32	\$98.94	\$118.50	\$152.14	\$59.39
	Median	\$0.00	\$0.00	\$0.00	\$60.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
GIFT/ SOUV-SELF	Mean	\$319.05	\$343.47	\$384.11	\$187.50	\$300.00	\$170.31	\$330.29	\$304.02	\$390.40	\$376.00	\$364.29	\$443.06
	Median	\$99.00	\$100.00	\$100.00	\$0.00	\$100.00	\$100.00	\$98.00	\$100.00	\$50.00	\$50.00	\$50.00	\$130.00
GIFT/ SOUV- F&F AT HOME	Mean	\$176.39	\$360.33	\$116.67	\$55.63	\$130.00	\$251.62	\$184.91	\$164.78	\$211.16	\$233.50	\$300.48	\$180.85
	Median	\$80.00	\$70.00	\$80.00	\$0.00	\$0.00	\$100.00	\$80.00	\$80.00	\$63.00	\$0.00	\$100.00	\$70.00
LOCAL TRANS	Mean	\$13.31	\$15.51	\$13.96	\$15.00	\$4.00	\$13.54	\$14.47	\$12.49	\$18.59	\$22.85	\$16.00	\$16.20
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
OTHER EXP	Mean	\$273.03	\$504.63	\$204.16	\$132.88	\$0.00	\$585.62	\$265.47	\$269.27	\$325.22	\$570.90	\$595.71	\$233.01
	Median	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50.00	\$10.00	\$15.50	\$0.00	\$155.00	\$200.00	\$0.00

Total Expenditures Tracking



Total Expenditures Per Person Segmentation

		TOTAL	FAMILY	OFFICE LADY	GROUP	SILVER	WEDDING	SPORT	18-35	36-55	CHILD	HONEYMOON	REPEAT
Total per person expense	Mean	\$1,601.40	\$1,566.27	\$1,763.99	\$964.38	\$1,163.65	\$1,947.31	\$1,715.75	\$1,635.32	\$1,499.64	\$1,299.42	\$2,109.09	\$1,690.99
	Median	\$1,416.15	\$1,305.29	\$1,626.67	\$1,081.25	\$1,271.88	\$1,661.46	\$1,545.78	\$1,477.08	\$1,288.28	\$1,269.68	\$2,171.88	\$1,563.80
	Minimum	\$0.00	\$205.00	\$350.00	\$0.00	\$195.31	\$450.00	\$0.00	\$0.00	\$100.00	\$249.61	\$100.00	\$100.00
	Maximum	\$7,088.54	\$5,976.56	\$4,326.82	\$1,890.04	\$1,661.56	\$4,854.17	\$5,976.56	\$5,976.56	\$7,088.54	\$2,302.08	\$4,854.17	\$5,976.56

SECTION 4
ADVANCED STATISTICS

Analysis Technique

- Dependent variables: total per person on island expenditure and overall satisfaction (numeric)
- Independent variables are satisfaction with different aspects of trip to Guam (numeric).
- Use of linear stepwise regression to derive predictors (drivers) of on-island expenditure and overall satisfaction, Since both the independent and dependent variables are numeric.
- This determines the significant ($p < .05$) drivers and the percentage of the dependent variables accounted for by each significant predictor and by all of them combined.

Drivers of Overall Satisfaction, October 2011	
Drivers:	rank
Cleanliness of beaches & parks	3
Ease of getting around	6
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	2
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	4
Variety of shopping	
Price of things on Guam	1
Quality of hotel accommodations	5
% of Overall Satisfaction Accounted For	49.9%
NOTE: Only significant drivers are included.	

Drivers of Overall Satisfaction

- **Overall satisfaction** with the Japanese visitor's experience on Guam is driven by six significant factors in the October 2011 Period. By rank order they are:
 - **Price of things on Guam,**
 - **Variety of daytime tours,**
 - **Cleanliness of beaches and parks,**
 - **Quality of shopping,**
 - **Quality of hotel accommodations, and**
 - **Ease of getting around.**
- With all six factors the overall r^2 is .499 meaning that **49.9% of overall satisfaction is accounted for by these six factors.**

Drivers of Per Person On Island Expenditures, Oct 2011	
Drivers:	rank
Cleanliness of beaches & parks	
Ease of getting around	
Safety walking around at night	
Quality of daytime tours	
Variety of daytime tours	
Quality of nighttime tours	
Variety of nighttime tours	
Quality of shopping	1
Variety of shopping	
Price of things on Guam	
Quality of hotel accommodations	2
% of Per Person On Island Expenditures Accounted For	9.2%
NOTE: Only significant drivers are included.	

Drivers of Per Person On Island Expenditure

- **Per Person On Island Expenditure** of Japanese visitors on Guam is driven by two significant factors in the October 2011 Period. They are:
 - **Quality of shopping, and**
 - **Quality of hotel accommodations.**
- With these two factors the r^2 is .092 meaning that **9.2% of Per person on island expenditure is accounted for by these factors.**